


Proteus Telephone Management System

User Manual

Software Version 6
Manual Version 1.1



Please Login to Use Proteus

User Name

Password

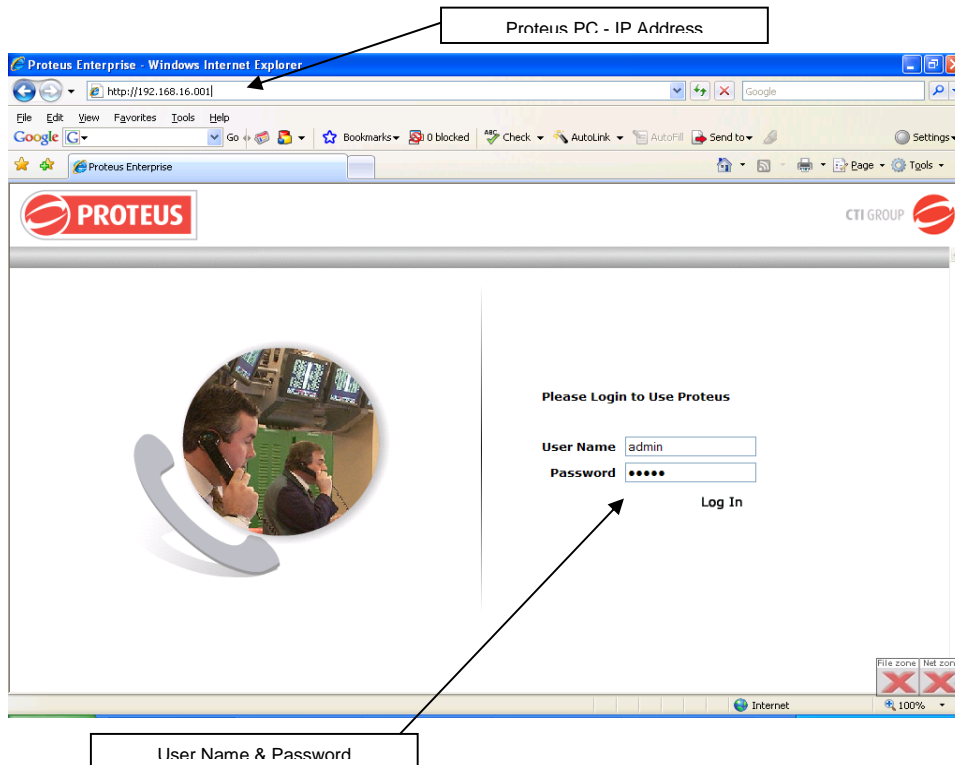
Log In

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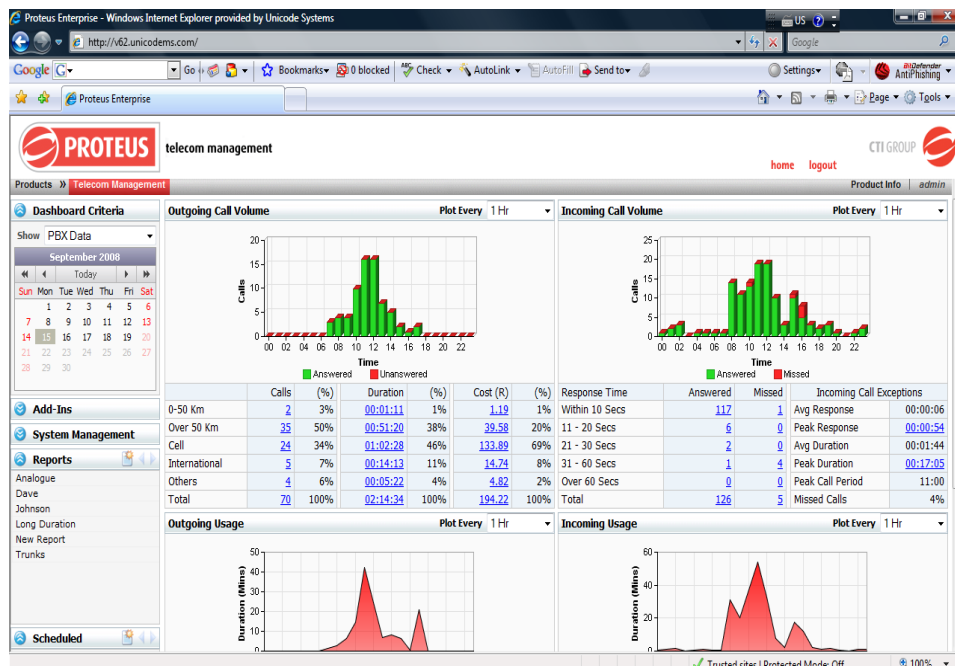
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1. Logging onto the Proteus Telephone Management System

Proteus Enterprise allows anyone to access the TMS report facility simply by typing in the address on the Internet Explorer. The Proteus server PC IP address must be typed into the Internet Explorer address bar.

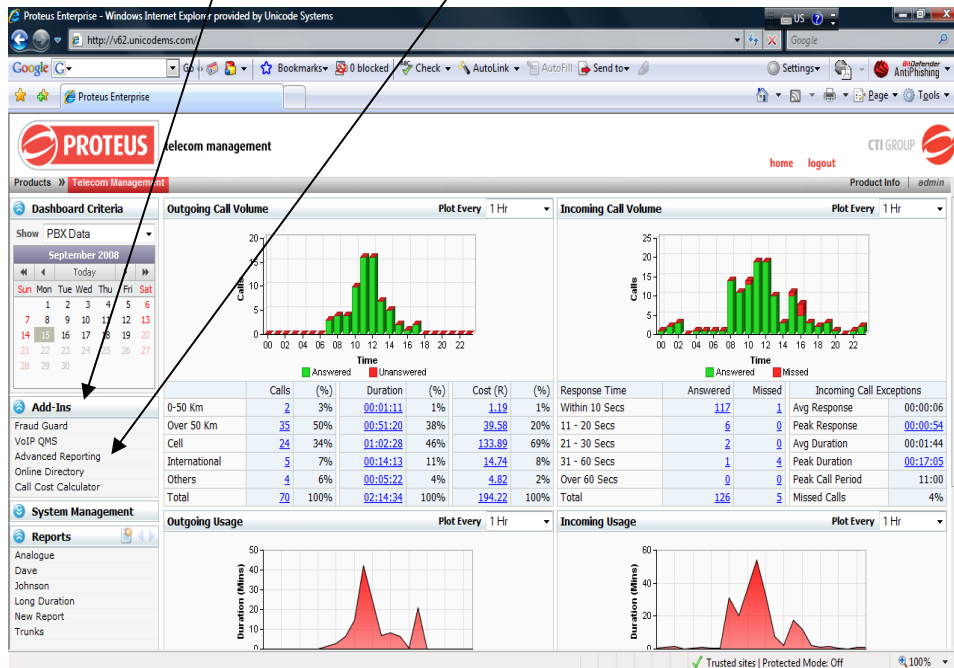


Once you've typed your User Name and Password, the Proteus Server will authenticate your login name and password against its internal list. The following Main Menu will appear.

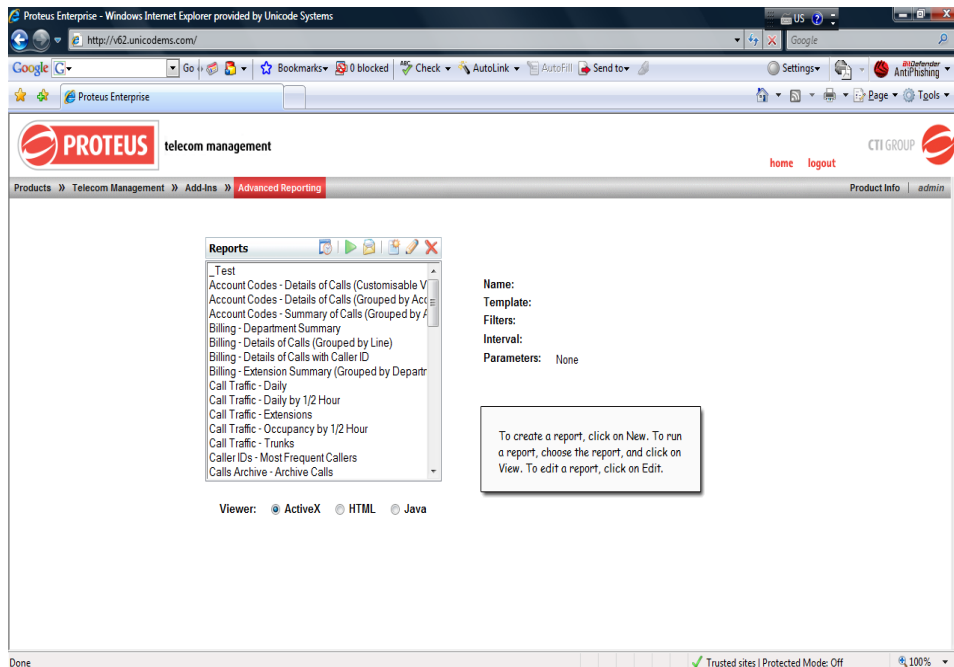


2. Reports Screen

2.1 From the Main screen CLICK on **Add-Ins** and the CLICK on **Advanced Reporting** (middle left of the screen).

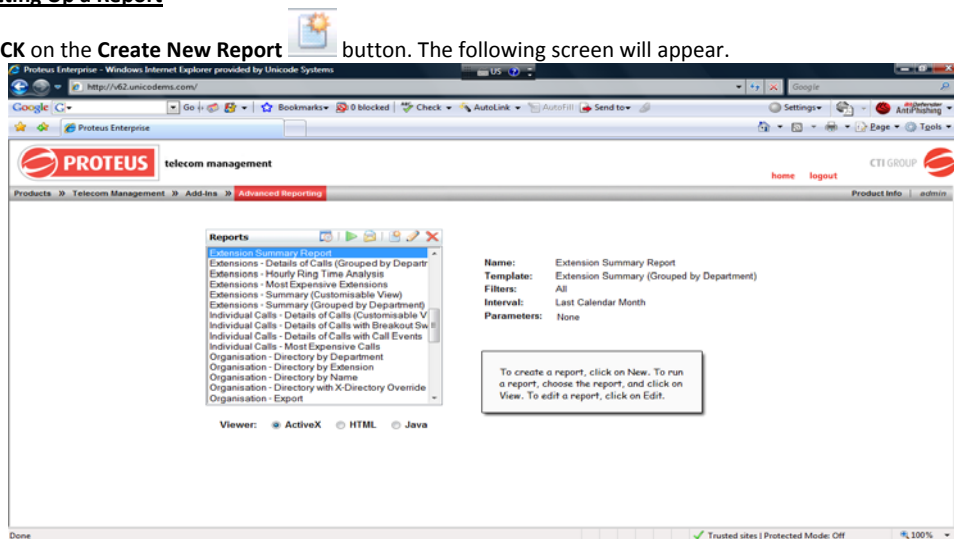


- The following Reports screen will appear. This is where your reports are configured. Any report you may create is unique to your logon and nobody else can access this report.

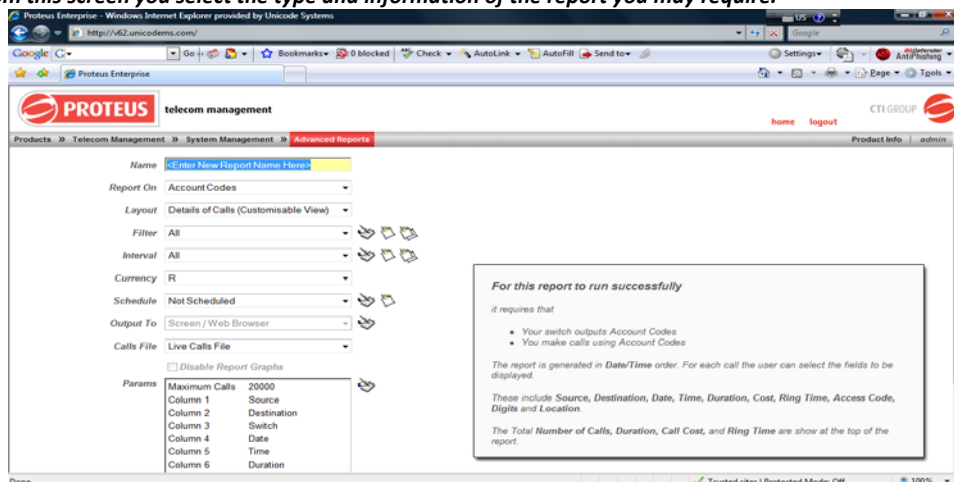


3. Setting Up a Report

3.1 **CLICK** on the **Create New Report** button. The following screen will appear.



3.2 **From this screen you select the type and information of the report you may require.**



- By **Name**, type a name for your report. E.g. Extension Summary Report.
- By **Report On**, CLICK on the dropdown arrow and select a report Type. E.g. Billing.
- By **Layout**, CLICK on the dropdown arrow and select the report you need. E.g. Extension Summary.
- By **Filter**, CLICK on the dropdown arrow and select the Filter you need E.g. All.
 - (See points 4.1 to 4.3 to select specific Exts, Depts, and Switches).
- By **Interval**, CLICK on the dropdown arrow and select the dates you need for the report. E.g. Last Calendar Month.
 - (See point 5.1 to select your own dates).
- By **Currency**, CLICK on the dropdown arrow and always keep the selection to **R**.
- By **Schedule**, you can choose to **Not Scheduled** or **Batch, Daily, Weekly, Monthly** etc.
 - (See point 6.1 to schedule the report).
- By **Output To**, will be greyed out if you did not select "schedule" and is used when you want to View or immediately E-mail the report.
 - (See output options under schedules in point 6.1)
- **Note:** If you do *not* want graphs to show on the reports then "Tick" the **Disable Report Graphs** box.
- By **Params**, it is automatically set to **None**.
 - (See point 7.1 for Parameters options)
- The report is now setup. CLICK on the **Save** button.

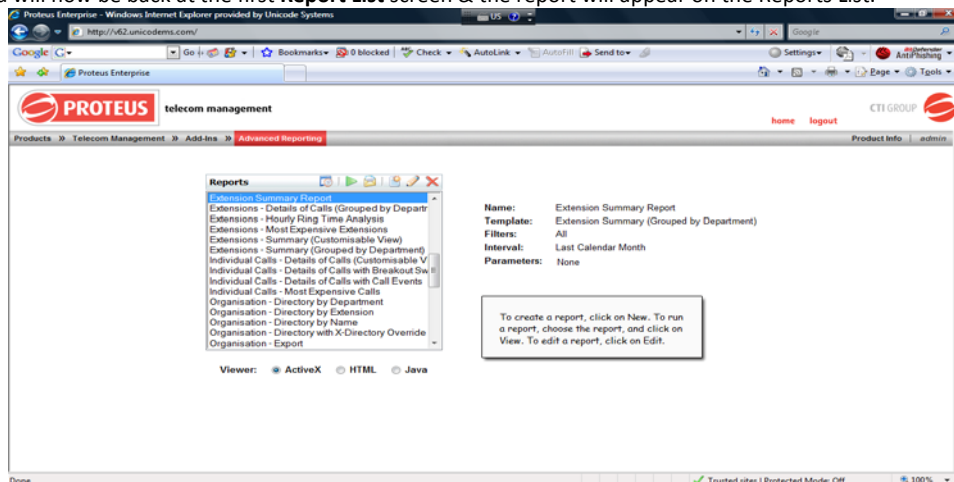
NOTE: Only for Companies that use pin codes

- Use the Person Summary or Person Detail reports (you can select to only show People, under the **Parameters**).
- This report / reporting rule only applies if you do not have a Hicom 300 / Hipath 4000 PABX.

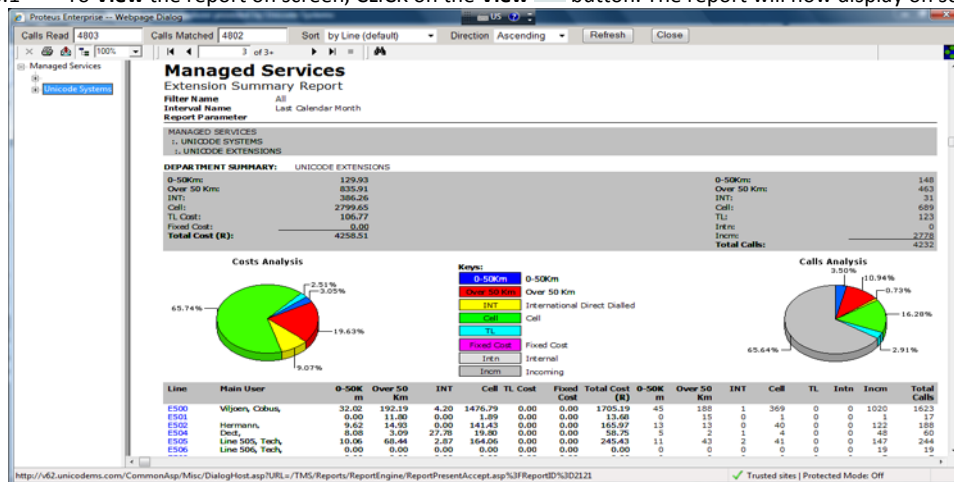
NOTE: All Reports / Reporting Users

- On all Detail reports, you need to increase the Call Match Limit from 2000 to 50 000 under the **Parameters**.

3.3 You will now be back at the first **Report List** screen & the report will appear on the Reports List.



3.3.1 To **View** the report on screen, **CLICK** on the **View** button. The report will now display on screen.



3.3.2 To **E-mail** the report, **CLICK** on the **E-mail** button. The pop-up box below will appear.

Proteus Reports - Run Report -- Webpage Dialog

Output Format: Acrobat Reader

Default (To): monica@siemens.com

CC:

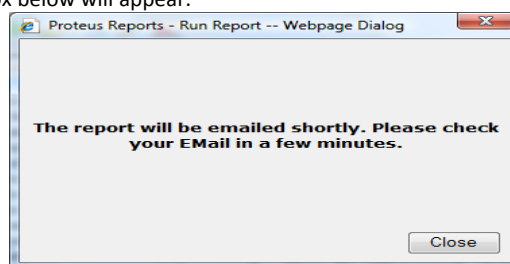
Subject: Extension Summary Report

Message: This is the NSN Extension Summary Report.

☐ Distribute Output

Cancel Run


- By **Output Format**, **CLICK** on the dropdown arrow and select the format you prefer E.g. Adobe Reader.
- By **To**, Type the e-mail address of the report recipient.
- By **CC**, Type other report recipients you may want to "copy" on the report e-mail.
- By **Subject**, Type a short description for the Report.
- By **Message**, Type a short message to the report recipient.
- **CLICK** on **Run**, the pop-up box below will appear.



4. Setting up Report Filters


4.1 Selecting **Outgoing** or **Incoming** Calls Only

The screenshot shows the Proteus telecom management interface. On the left, the 'Filter' tab is active, showing a form for 'Extension Summary Report'. The 'Filter' dropdown is set to 'All'. On the right, the 'Options' tab is active, showing the 'Filter Name' as 'Outgoing Calls Only'. The 'Filter Description' section shows 'Calls which meet All Criteria' and 'Departments Filtered by Lines'. The 'Filter Selection' section shows 'Outgoing' checked, 'Incoming' unchecked, 'Internal' unchecked, and 'Tandem' unchecked. The 'Filter Description' section shows 'Calls Types Outgoing'.

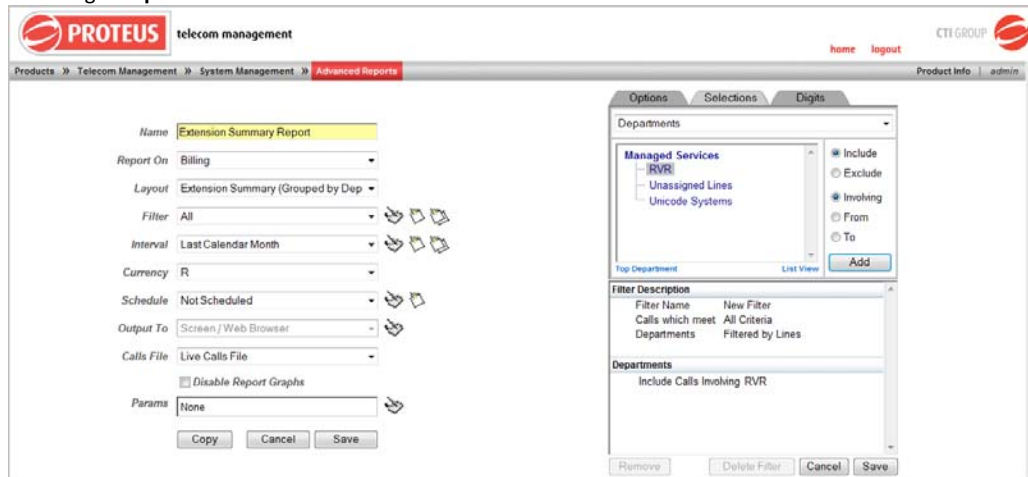
- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by the **Filter**.
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name**, Type a unique name for the new Filter E.g. Outgoing Calls Only.
- On the right-hand side of the screen, un-check the Incoming, Internal and Tandem boxes. The **Outgoing**, **Answered** and **Unanswered** boxes must remain checked ☒.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).
 - Follow the *exact* same procedure for **Incoming** calls (un-check Outgoing and leave Incoming checked).


4.2 Selecting an **Extension/s**

The screenshot shows the Proteus telecom management interface. On the left, the 'Filter' tab is active, showing a form for 'Extension Summary Report'. The 'Filter' dropdown is set to 'All'. On the right, the 'Options' tab is active, showing the 'Filter Name' as 'Specific Extension'. The 'Filter Description' section shows 'Calls which meet All Criteria' and 'Departments Filtered by Lines'. The 'Filter Selection' section shows 'Lines within switch' selected, 'Switch' set to 'Hipath', and 'Line Type' set to 'Extensions'. A list of extensions is shown, with 'E500' selected. The 'Filter Description' section shows 'Extensions for Hipath' and 'Include Calls Involving E500'.

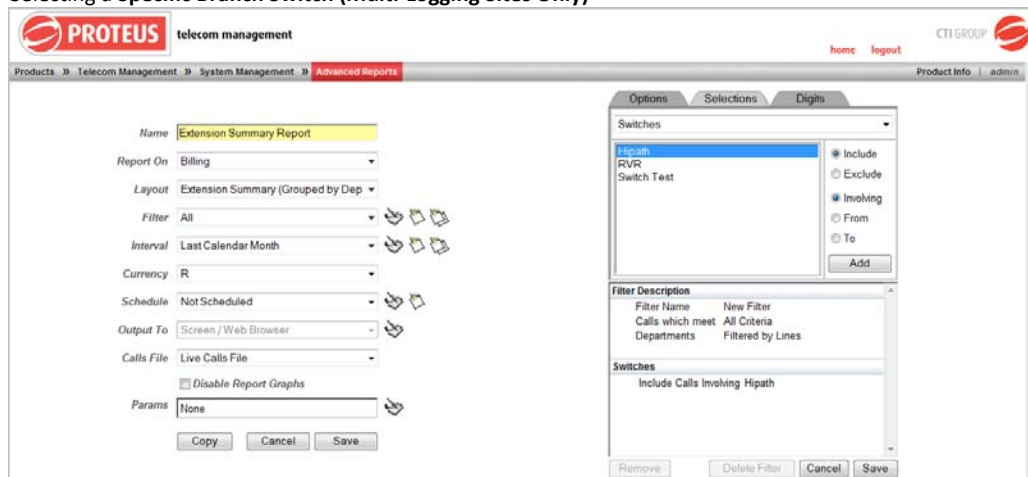
- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by the **Filter**.
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name**, Type a unique name for the new Filter E.g. E500 Specific.
- CLICK on the **Selection** tab (at the top by Options, Selections, Digits). Where it shows **Switches**, CLICK on the dropdown arrow and CLICK on **Lines within Switch**.
- By **Switch**, CLICK on the dropdown arrow and select the Switch you require (multi-site systems only).
- By **Line Type**, leave the selection on **Extensions**. A list of the extensions will appear, CLICK on the extension you require and CLICK on **Add**. (You may **Add** as many extensions as you require). The extension will now appear in the bottom of the box.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).


4.3 Selecting a Department



- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by the **Filter**.
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name**, Type a unique name for the new Filter E.g. Specific Dept RVR.
- CLICK on the **Selection** tab (at the top by Options, Selections, Digits). Where it shows **Switches**, CLICK on the dropdown arrow and CLICK on **Departments**.
- A list of the Departments will appear, CLICK on the Department you require and CLICK on **Add**. (You may **Add** as many Departments as you require). The Department will now appear in the bottom of the box.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).

4.4 Selecting a Specific Branch Switch (Multi-Logging Sites Only)





- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by the **Filter**.
- A screen will pop-up on the right hand side (this is the Filter Selection screen).
- By **Filter Name**, Type a unique name for the new Filter E.g. Switch Hipath.
- CLICK on the **Selection** tab (at the top by Options, Selections, Digits). Where it shows **Switches**, CLICK on the dropdown arrow and CLICK on **Switches**.
- A list of the Switches will appear, CLICK on the Switch you require and CLICK on **Add**. (You may **Add** as many Switches as you require). The Switch will now appear in the bottom of the box.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).


5. Setting up Specific Interval Dates

5.1 Selecting Specific Dates on an Interval

The screenshot shows the 'Proteus telecom management' interface. The main configuration area on the left includes fields for Name, Report On, Layout, Filter, Interval, Currency, Schedule, Output To, Calls File, and Params. A pop-up window on the right, titled 'Interval Name: Specific Dates', allows for configuring specific reporting intervals. It includes checkboxes for days of the week, start and end times, and options for user-defined or pre-defined durations.


- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by **Interval**.
- A screen will pop-up on the right hand side (this is the Interval Selection screen).
- By **Interval Name**, Type a unique name for the new Filter E.g. Specific Dates.
- CLICK on the **User Defined Duration** button .
- By **Start Date**, CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- By **End Date**, CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- Now CLICK on **Save** on the right-hand side of the screen and then CLICK **Save** on the left of the screen. You can now run the report as normal (as in 3.3.1 & 3.3.2).


Recommendations:

- Leave all the **Days Of Week** boxes ticked.
- Leave the **Times** - Start & End as 00:00:00 to 23:59:59 (If you *do* enter a start and end time then you *must* check  the **Times Apply To Start And End Dates** box.

6. Scheduling a Report

6.1 Selecting the Report Schedule and Output

- From the Report setup screen (as in point 3.1), CLICK on the **New**  the button, next to the dropdown arrow by **Schedule**.
- Select the type of schedule you require E.g. Calendar Month (Weekly or Daily).
- By **Interval**, leave the selection to Calendar Month (leave to Weekly or Daily if you selected one of these options).
- By **Status**, CLICK on the dropdown arrow and select **Waiting**.
- By **Start Date**, CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- By **End Date**, CLICK on the first dropdown arrow and select the day on which the report must begin; then CLICK on the second dropdown arrow and select the month; then CLICK on the third dropdown arrow and select the year.
- Now CLICK on **Save** on the bottom of the schedule pop-up screen.
 - Do not CLICK **Save** at the bottom left of the screen as yet. Stay in the report screen as you must now setup your schedule output format.

- By **Output To**, CLICK on the dropdown arrow and CLICK on **Email**, then CLICK on the Edit  button next to the dropdown arrow, the **Email Output Options** screen will pop-up.
- By **Format**, CLICK on the dropdown arrow and select the format you prefer E.g. Adobe Reader.
- By **To**, Type the e-mail address of the report recipient.
- By **CC**, Type other report recipients you may want to "copy" on the report e-mail.
- By **Subject**, Type a short description for the Report.
- By **Message**, Type a short message to the report recipient.
- CLICK on **Set**, on the bottom of the screen, then CLICK **Save** on the left of the screen.
- The report will now save to your Schedules.

7. Setting up Departments & People

7.1 Creating a Department



- From the Main screen, CLICK on **System Management** (left side of the screen); then CLICK on **Departments & People**.
- The following screen will appear, this is where you will setup Departments and People.

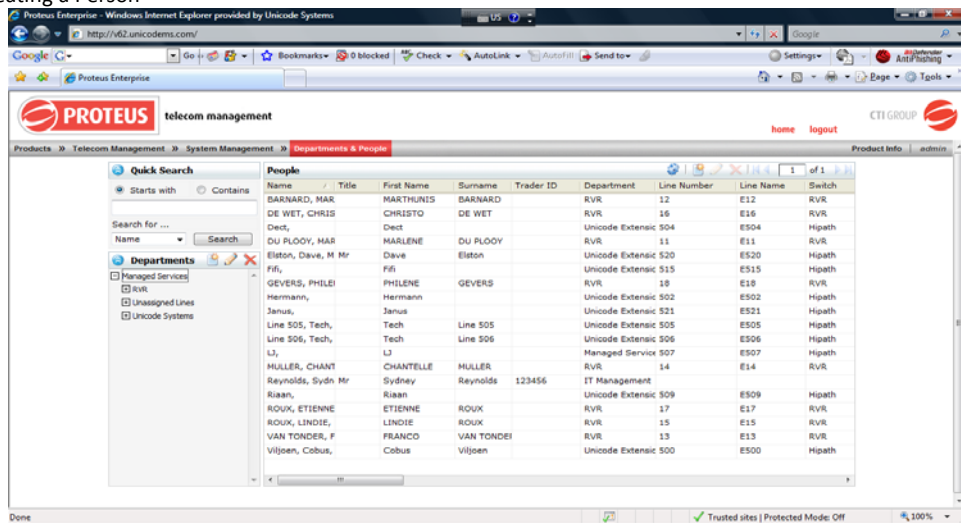
The screenshot shows the 'Departments & People' screen. The left sidebar has a 'Departments' section with a sub-link 'Managed Services'. The main content area displays a table of people with columns: Name, Title, First Name, Surname, Trader ID, Department, Line Number, and Line Name.

- CLICK on the **Create New Department** button, next to **Departments**, on the left side of the screen, the following screen will appear.

The screenshot shows the 'Edit/New Department' dialog box. It has tabs for 'General', 'People', and 'Telecom'. The 'General' tab is active, showing fields for 'Department Name', 'Parent Department', 'Cost Centre', 'Description', and 'Unique ID'. The 'Description' field is expanded, showing 'Sales Team' and 'Parent Department Managed Services'. The 'Save' button is highlighted.

- By **Department Name**, TYPE the name of the new Department.
- By **Parent Department**, CLICK on the first dropdown arrow and select the Main Department to which the new Department belong.
 - **Note:** If the new Department is a Main Department then Select the Site Name – this will be at the very top of the list under the dropdown arrow.
- CLICK on the **Save** button on the bottom right of the screen. You will now be back at the main **Departments & People** screen.

7.2 Creating a Person

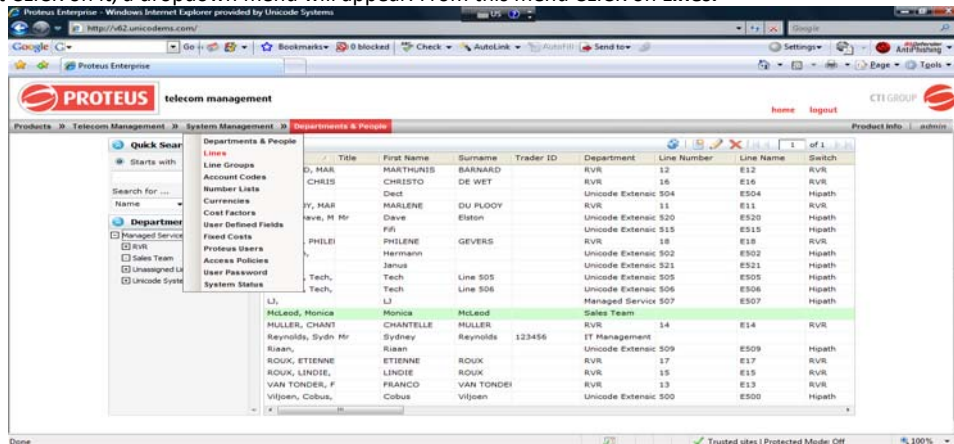


- From the **Departments & People** screen, CLICK on the **Create New Person** button, at the top right of the screen.
- The following screen will appear, this is where you will setup People.

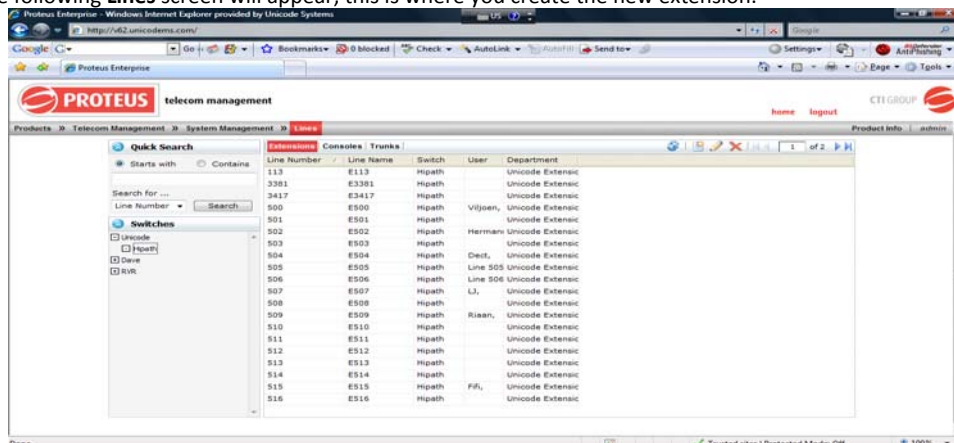
- By **Title**, TYPE the Title of the new Person E.g. Mr., Ms., Ms.
- By **First Name**, TYPE the Name of the new Person.
- By **Surname**, TYPE the Surname of the new Person.
- By **Department**, CLICK on the dropdown arrow and select the Department to which the new Person belongs.
- By **Pin**, TYPE the pin number of the new Person.
 - **NOTE: This field is only used under the following conditions:**
 - a) If your Company uses pin codes.
 - b) Even if your Company does use pin codes – it is *not* filled in if you have a Hicom 300 or Hipath 4000 PABX.
- By **Unique ID**, leave the field blank
- CLICK on the **Save** button, at the bottom left of the screen.

7.3 Creating a New Extension (Line)

- From the **Departments & People** screen, HOLD the mouse cursor over **System Management** on the top line menu. Do not CLICK on it, a dropdown menu will appear. From this menu CLICK on **Lines**.



- The following **Lines** screen will appear, this is where you create the new extension.



- NOTE:** If you are logging multiple sites first, CLICK on the Plus sign, next to the relevant Site name and then CLICK on the Switch name.
- From the **Lines** screen, CLICK on the **Create New Item** button, at the top right of the screen, the following **Edit/New Extension** screen will appear.

Edit/New Extension

Extensions must be assigned to a department, optionally they can also be assigned to any number of users. You can also assign fixed costs – e.g. line rental to the Extension.

Line **Users** **Fixed Costs** **Info**

Switch Name: Hipath

Extension Name: E112

Extension Number: 112

Department: Sales Team

Cost Factor:

Extension Description

Extension Name: E112

Extension Number: 112

Switch: Hipath

Department: Sales Team 100%

Allocation Save Cancel

- By **Extension Name**, do *not* enter anything.
- By **Extension Number**, type the new extension number.
- By **Department**, CLICK on the dropdown arrow and select the Department to which the extension belongs.
 - At this time you will notice that the **Extension Name** field has automatically updated itself.
- Now CLICK on the **Users** tab at the top of left of the screen.

- The following **Users** screen will appear.

Proteus Line Admin Edit -- Webpage Dialog

Edit/New Extension
Extensions must be assigned to a department, optionally they can also be assigned to any number of users. You can also assign fixed costs – e.g. line rental to the Extension.

Line Users Fixed Costs Info

Department: Sales Team

All Data: [McLeod, Monica]

Extension Description

Extension Name: E112
Extension Number: 112
Switch: Hipath
Department: Sales Team 0%

Users of this Extension

Name: McLeod, Monica
Department: Sales Team 100%

Allocation Save Cancel

- From this screen, you *must* CLICK on the dropdown arrow next to **Department** and select the Department to which the extension user belong.
- CLICK on the User name and CLICK on the Add » button, in the middle of the screen. The user will appear at the right-hand side of the screen.
- NOTE:** If the Extension and Person does not show the same Department, then you must go back to the People screen and assign the user to the correct same Department, which the extension belongs to (otherwise the reports will not work correctly).

8. Moving a User to Another Extension/Department

- 8.1 Go onto the **Departments & People** screen, under the **System Management** menu, to start the move.

Line Number	Line Name	Switch	User	Department
112	E112	Hipath	McLeod, Monica	Sales Team
113	E113	Hipath	Unicode Extensic	
3381	E3381	Hipath	Unicode Extensic	
3417	E3417	Hipath	Unicode Extensic	
500	E500	Hipath	Viljoen, Unicode	Unicode Extensic
501	E501	Hipath	Unicode Extensic	
502	E502	Hipath	Herrmans Unicode	Unicode Extensic
503	E503	Hipath	Unicode Extensic	
504	E504	Hipath	Dect, Unicode	Unicode Extensic
505	E505	Hipath	Line 505 Unicode	Unicode Extensic
506	E506	Hipath	Line 506 Unicode	Unicode Extensic
507	E507	Hipath	LI, Unicode	Unicode Extensic
508	E508	Hipath	Unicode Extensic	
509	E509	Hipath	Riaan, Unicode	Unicode Extensic
510	E510	Hipath	Unicode Extensic	
511	E511	Hipath	Unicode Extensic	
512	E512	Hipath	Unicode Extensic	
513	E513	Hipath	Unicode Extensic	
514	E514	Hipath	Unicode Extensic	
515	E515	Hipath	FFI, Unicode	Unicode Extensic

- From the list of extensions and Users that appears, **DOUBLE CLICK** on the User, which you want to move.

- The following **Edit/New People** screen will appear.

Proteus People Admin Edit -- Webpage Dialog

Edit/New People
People are assigned to a department for reporting purposes. You may also assign user defined fields (UDF) to a person, such as mobile number, email address etc.

General | Telecom | UDF

Title:

First Name:

Surname:

Department:

PIN:

Unique ID:

Description

Name	McLeod, Monica
Department	Unicode Extensions

Telecom Extensions and Consoles

E112, Hipath

- By **Department**, CLICK on the dropdown arrow and select the Department to which the User must move.
- On the right hand side of the screen, CLICK on the existing extension number then, CLICK on the Remove button. The extension will no longer appear on the right of the screen, and the screen will display as follow.

Proteus People Admin Edit -- Webpage Dialog

Edit/New People
People are assigned to a department for reporting purposes. You may also assign user defined fields (UDF) to a person, such as mobile number, email address etc.

General | Telecom | UDF

Title:

First Name:

Surname:

Department:

PIN:

Unique ID:

Description

Name	McLeod, Monica
Department	Unicode Extensions

Telecom Extensions and Consoles

- CLICK on the **Telecom** Tab on the top left of the screen, the following screen will appear.

Proteus People Admin Edit -- Webpage Dialog

Edit/New People
People are assigned to a department for reporting purposes. You may also assign user defined fields (UDF) to a person, such as mobile number, email address etc.

General | **Telecom** | UDF

Lines within Department:

Managed Services:

All Data

E11, RVR - DU PLOOY, MARLENE.
E12, RVR - BARNARD, MARTHUNIS.
E15, RVR - ROUX, LINDIE.
E16, RVR - DE WET, CHRISTO.
E17, RVR - ROUX, ETIENNE.
E18, RVR - GEVERS, PHILENE.

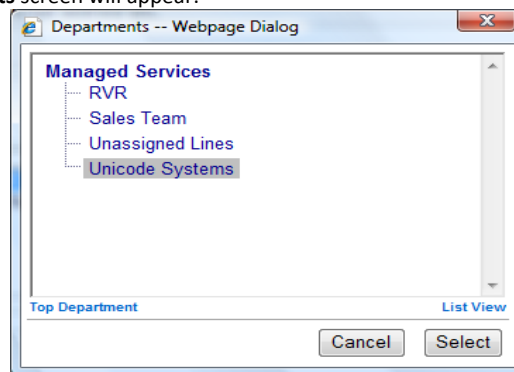
Description

Name	McLeod, Monica
Department	Unicode Extensions

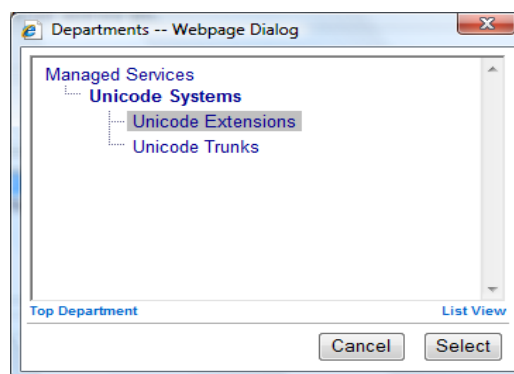
Telecom Extensions and Consoles

- From this screen you *must* Click on the **More** button to the left of the **Add** button.

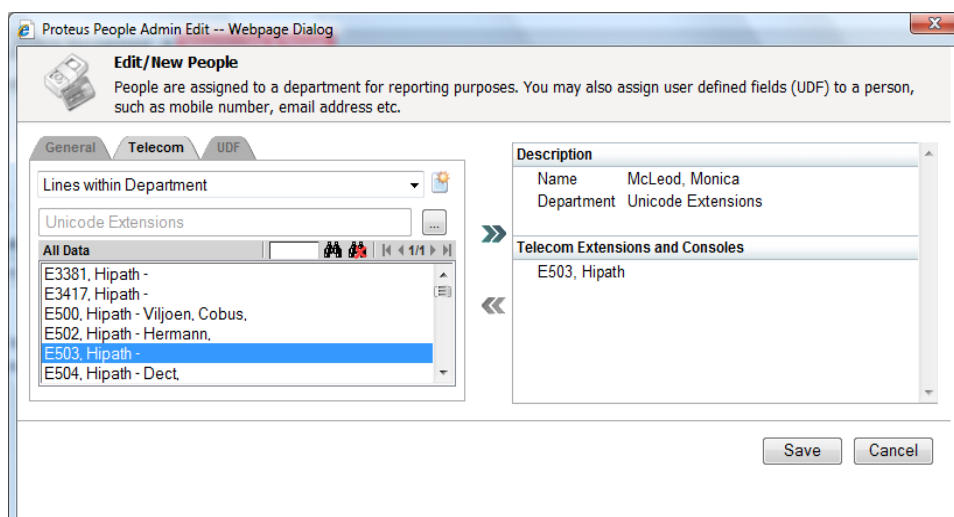
- The following **Departments** screen will appear.



- From this screen:
 - For Multi-Site logging systems - DOUBLE CLICK on the relevant Switch/Main Department.
 - For Single-Site logging systems - SINGLE CLICK on the 1 Department Level.



- You will see a Department Tree structure and the screen which will appear will be similar to the screen above.
- CLICK on the Department to which the extension, which you want to move the user to , belongs and CLICK on the **Select** button on the bottom right of the screen
- The following extension list screen will appear.



- CLICK on the new extension number on the left of the screen and CLICK on the **Add** button. Now CLICK on the **Save** button.

- The following screen will appear.

- Check on the right hand side of the screen that the User and Extension is assigned to the same Department (Otherwise the reports will not reflect the correct information). CLICK on the **Save** button.
- If the Departments are different:
 - For the extension, CLICK on the down arrow next to **Department** and select the correct Department.
 - For the User, go back to the **Departments & People** screen, double Click the User name and select the correct Department, to which the User must be assigned.

9. Changing a Department Name

- 9.1 Go to the **Departments & People** screen, under the **System Management** menu.

Name	Title	First Name	Surname	Trader ID	Department	Line Number	Line Name	Switch
BARNARD, MAR	MARTHUIS	BARNARD	DE WET		RVR	12	E12	RVR
DE WET, CHRIS	CHRISTO	DE WET			RVR	16	E16	RVR
DEW, DU PLOOY, MAR	Died	MARLENE	DU PLOOY		Unicode Extension	504	E504	Hipath
Elston, Dave, M Mr	Dave	Elston			RVR	11	E11	RVR
FA, PHILENE	PHILENE	GEVERS			Unicode Extension	520	E520	Hipath
Hermann, Janus	Hermann				Unicode Extension	515	E515	Hipath
Line 505, Tech, LJ	Tech	Line 505			RVR	18	E18	RVR
Line 506, Tech, CHANTELLE	Tech	Line 506			Unicode Extension	502	E502	Hipath
Reynolds, Syd, Mr	Sydney	Reynolds			Unicode Extension	521	E521	Hipath
ROUK, ETIENNE	ETIENNE	ROUK			Unicode Extension	505	E505	Hipath
ROUK, LINDIE	LINDIE	ROUK			Unicode Extension	506	E506	Hipath
VAN TONDER, F	FRANCO	VAN TONDER			Managed Service	507	E507	Hipath
Viljoen, Colbus	Colbus	Viljoen			RVR	14	E14	RVR
					IT Management			
					Unicode Extension	509	E509	Hipath
					RVR	17	E17	RVR
					RVR	19	E19	RVR
					RVR	13	E13	RVR
					Unicode Extension	500	E500	Hipath

- CLICK on the Department which you want to change, on the left side of the screen and CLICK on the **Edit** button. The following screen will appear.

- By **Department Name**, delete the old name and enter the new name. CLICK on the **Save** button on the bottom right of the screen.
- The Department name will be changed and will automatically be applied to all Users/Extensions which are assigned to the Department.